Notes from the Oct 10th Out and Equal Workshop “Breaking up is hard to do”

Question 1: Was there a natural leader;

* Multiple leaders
* Subject Matter Experts
* Other individuals contributed
* Lots of collaboration

if so did it help?

* Helped to provide direction
* Set a vision for others to add to

if not – would it have helped?

* Still would have had goal minded success
* “consensual creativity”
* No natural leader (worked ok because of shared goal built onto the existing goal)

When the leader left?

* Blind continuance
* Changed goal completely, crash, salvage, rebrand
* Leader who left, continued but floundered – browbeat by new leaders

Facilitator comments:

Having a leader in place (both at the remaining company as well as the new company (brand new or the acquiring company) can be a real plus. Someone in this role can be the “glue” that holds the ERG that is transitioning together and the holder of the artifacts that we discuss later. They are also the keeper of the history so that this can be shared and perhaps leveraged to the new company.

Question 2: Did you take any Artifacts?

* Necklaces and bracelets
* Incorporate into new design
* Some didn’t notice bringing them, or combining with new
* Subconsciously did not realize still wearing old colors, put on new colored bracelet and they got twisted together

If no – would it have helped?

* Can be hard to integrate very different materials
* Forced a design rethink
* Some pieces/blocks were easier to adjust to, similar materials made things easier – message here is take the best and leave the rest behind
* Did not actively consider – not part of the directions (someone might have tried to stop them)
* People sitting at the table may have tried to stop others from taking stuff as they left, others would have felt bad taking away from original team
* ERG is not likely Intellectual Property; HR policy; Think about what you want to retain

Facilitator comments:

History can be very important to maintain cohesiveness of a group. If you are starting up a new company then having a “head start” with policies, Mission and Vision statements, governance documents are helpful to get people rallied around the important work earlier. At the same time, this is also an opportunity to review what your purpose and “mode of operation” needs to be given the new company and the direction that it is going.

If you are merging with another company, this is an opportunity to review and essentially question everything that the old and new have been doing, selecting the best and leaving behind old thinking and ways of doing things.

One key learning we had – having your existing Distribution List will save significant time in trying to get organized.

Question 3: Did you Collaborate with your old team? (this could be the old ERG from the original company; note collaboration helps achieve critical mass))

* No

Did you collaborate with any of the other teams? (this could be ERG’s from other companies)

* No

Did you collaborate with the facilitators? (this could be external groups or non-profits)

* No

Missed opportunity to build critical mass – collaborate across companies, other ERGS, or potentially with other external groups or non-profits

Facilitator Comments:

This is a huge carrot that many ERG’s are not taking advantage of whether during a split or even as you continue to operate as an ERG without MA&D.

Collaboration with the previous ERG can save time and effort because you likely did not have advanced notice of the change or were prohibited from engaging the other companies ERG. If there is a spin off and a new company is started, you essentially have no structure so having a “mentor” from the original company would be helpful.

Collaboration with other companies brings the richness of experience given the level of MA&D that has been happening over the last several years. You can gather great ideas about how to keep people engaged and focused on the ERG as well as how to better engage the C level around issues. This also helps you build and maintain critical mass when you may not have it yet in the new company.

Collaboration with outside agencies and non-profits also helps with building and maintaining a critical mass, especially in the beginning. This can be a real business booster for the new start up companies because it gets your company out in front of the local community and builds positive brand recognition. Many of these outside agencies and non-profits have “how to” information about starting and driving ERG’s as well as how to partner with them to help the community.

Question 4: If you knew you were splitting, what would you have done differently?

* If you knew you were leaving, engagement shift (current to the next team)
* May have contributed less to the current team??
* Planned transitions; better transition and onboarding for the new team members
* Simpler roadmap for people left behind to follow
* About half of the teams did the speed teaming exercise after the split (this helped)
* Renaming the team helped
* Would have talked to the newer team earlier
* Lay the ground work to make the transition easier, generally you have some advanced notice
* From a legal standpoint, may not be able to reach out ahead of time so focus on the “publice, non-proprietary information and community outreach type of things

Facilitator Comments:

Nothing but good comes from planning. If you know from onset that you are going to be separating, you can select a lead (even if you are merging with or being acquired by another company – having a lead person that is holding all the artifacts and the history can be a big bonus as you move into the new environment.

Question 5: Overcoming challenges

* Meet the new/coming team first; forward the work to decrease the pain involved but be aware of the legal limitations on contact especially during acquisitions.

Question 6: How can change be an opportunity?

* Emphasis on speed was a detriment; being able to regroup/refocus would have helped; take a step back, ERG’s can provide support
* Speed also provides positive pressure to achieve normalcy
* Chance to reinvent/reassess/improve
* Personal responsibility to keep an open mind and advance the new team

Experiences/key learnings from participants

* Observe change and types of dynamics with a Merger, Acquisition or Divestiture; hostility can be a barrier with M&A
* Encouragement to internal social media can help improve collaboration/communication/human connection; encourage network building with technology tools
* Change in role for ERG leaders – ERG can become “extra” work on top of managing scope of primary role
* Joint dedication to shared leadership can increase success
* Need to find alignment if not arising automatically (Merger/Acquisition)
* Might need to rearticulate what is important in group culture despite pressure for other directions
* Be honest about when to yield
* Leadership changes – what engages you and how do you want to grow (comment on ERG/valuable always)
* ERG leadership can be upset by MA&D; not a lot of time for extra work and running and ERG/setting up a new network if you are also very busy on the business side of the change
* Passion for/dedication to the original plan made it easy to incorporate new people; similarities between companies/people maintain culture makes it easier to stay cohesive
* Can be easy to overlook/disrespect culture of a smaller group being brought in
* Be willing to understand and consider adopting the new company’s culture/design- it can be valuable to yield to power
* Communication both with other internal ERGs as well as outside groups
* Turnover of leadership even outside of M&A; focus on what engages your employees and ERG members